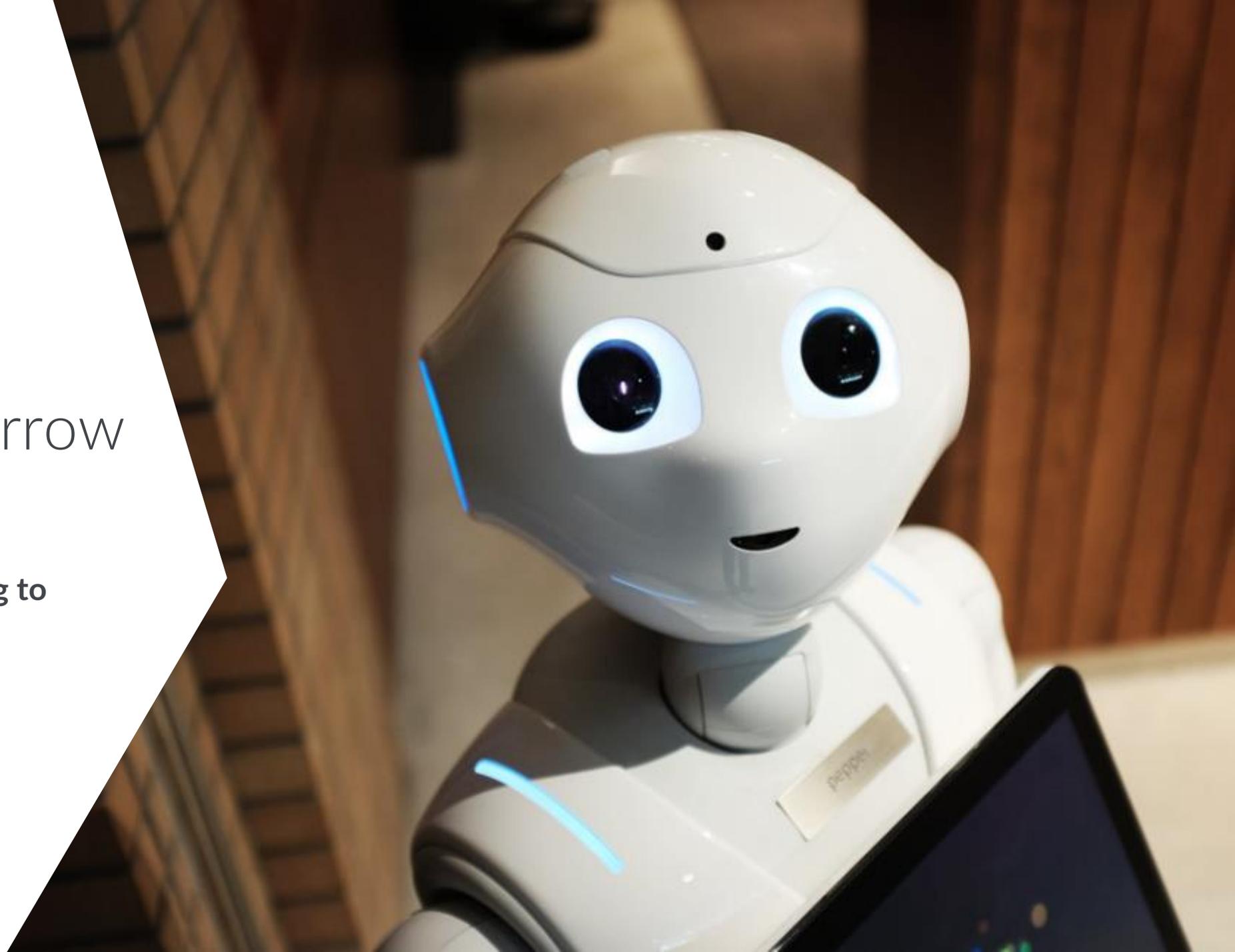




ShoppingTomorrow 2020

**The future of retail according to
Dutch consumers**

ShoppingTime - 16 September 2020



Coronacrisis stimuleert onlinebetalingen

50-plussers ontdekken online shoppen door corona

Flinke stijging bezorging pakketjes bij PostNL door corona

'Corona versnelt ontwikkelingen in winkelstraat: online wordt echt onmisbaar'



How do consumers foresee to shop in 2025?

Poll



In Q1 2020 consumers spent 26% of their money online on purchases of products and services.

How do you think that this percentage will develop in 2025?

A: Decrease below 26%

B: Stabilize at 26%

C: Increase to max. 35%

D: Increase above 35%

Consumers expect that 37% of their spendings will be done online in 2025



(Expected) overall B2C online share in value

Actual online share in spending

2020 (Q1)

26%



2016 **2017** **2018** **2019**

23% **24%** **26%** **27%**

Expected online share in spending

2025

37%

According to ...
Consumers

2021 **2022** **2023** **2024**

32% **35%** **37%** **38%**

Total B2C online share in value including product and services

* Source: Thuiswinkel Markt Monitor, Q1 2016, Q1 2017, Q1 2018, Q1 2019, Q1 2020

** Source: ShoppingTomorrow Research 2016, 2017, 2018, 2019, 2020

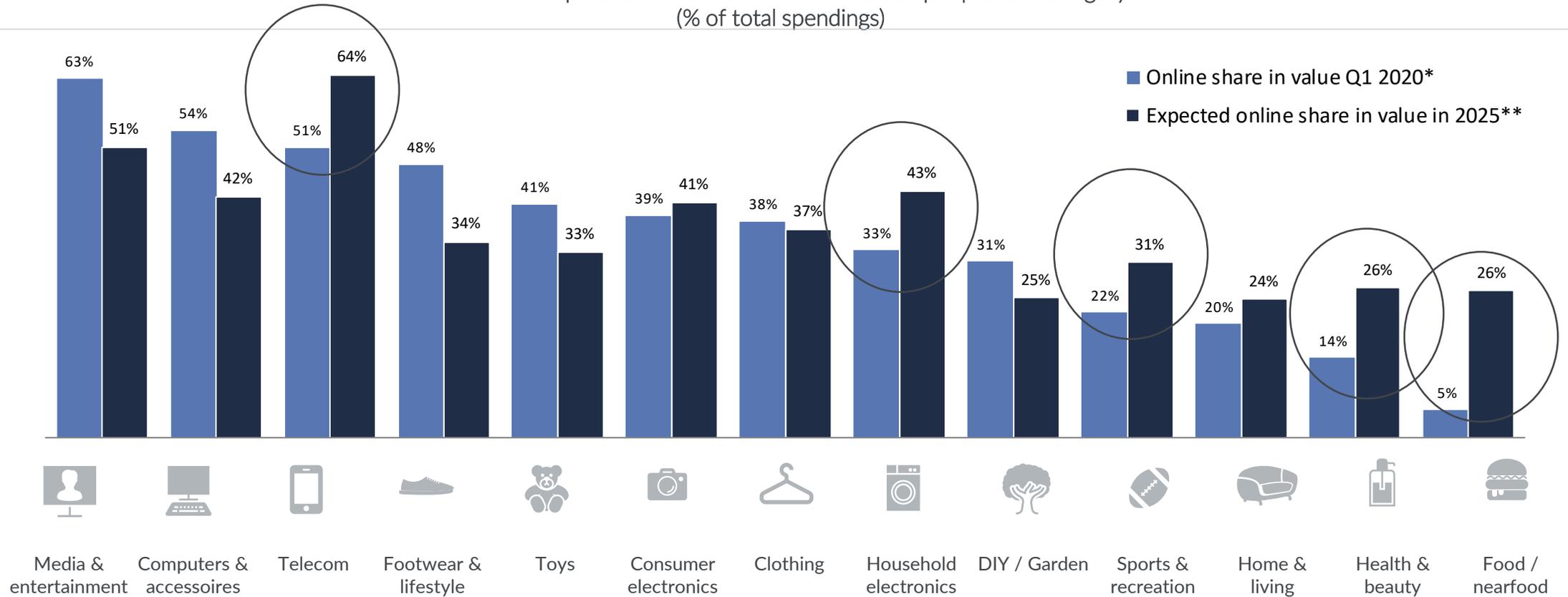
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Base: all respondents
2020: n=1.026

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Consumers expect that they will do their Food/nearfood and Health and Beauty purchases more often online in 2025

Actual and expected online share in value in 2025 per product category
(% of total spendings)



A03: What share of your total spending in product category X do you expect to spend online in 5 years?

* Source: Thuiswinkel Markt Monitor Q1 2020

** Source: GfK ShoppingTomorrow Research 2020

■ ShoppingTomorrow 2020

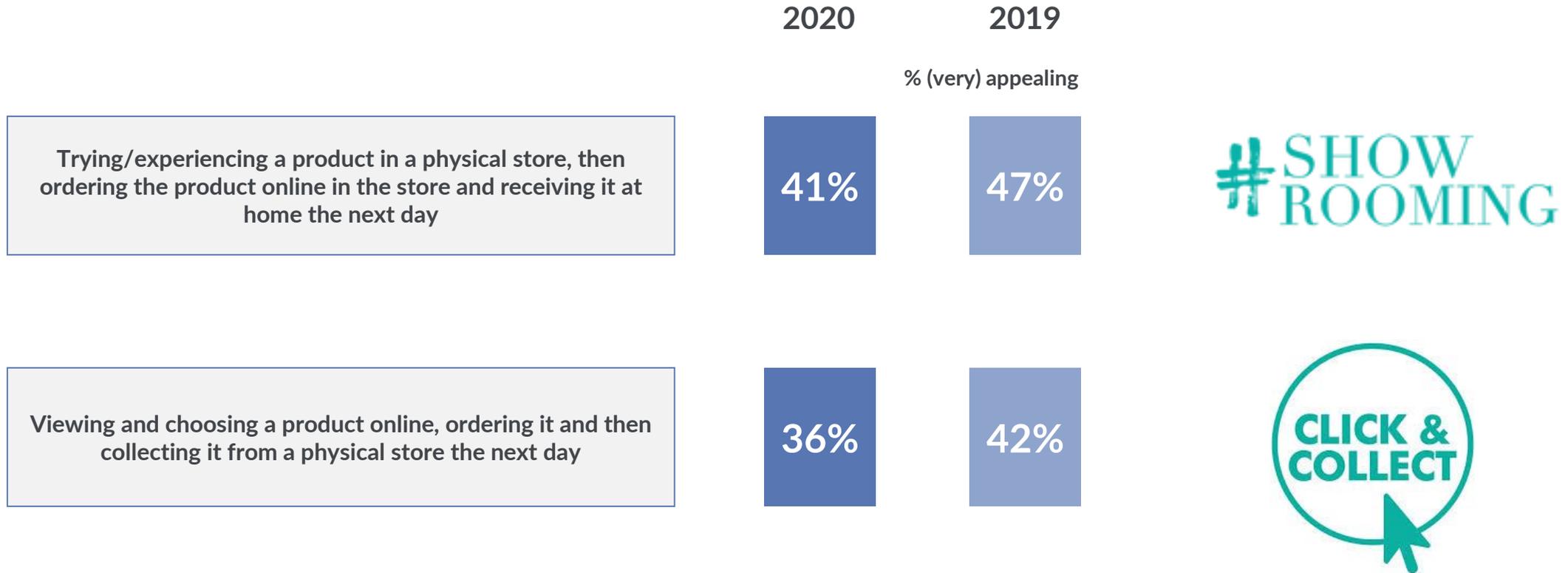
Base: all respondents, n=1.026

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“Showrooming” and “Click & Collect” are less appealing than previous year



Store opportunities



B04: To what extent do you think the following store opportunities are appealing?

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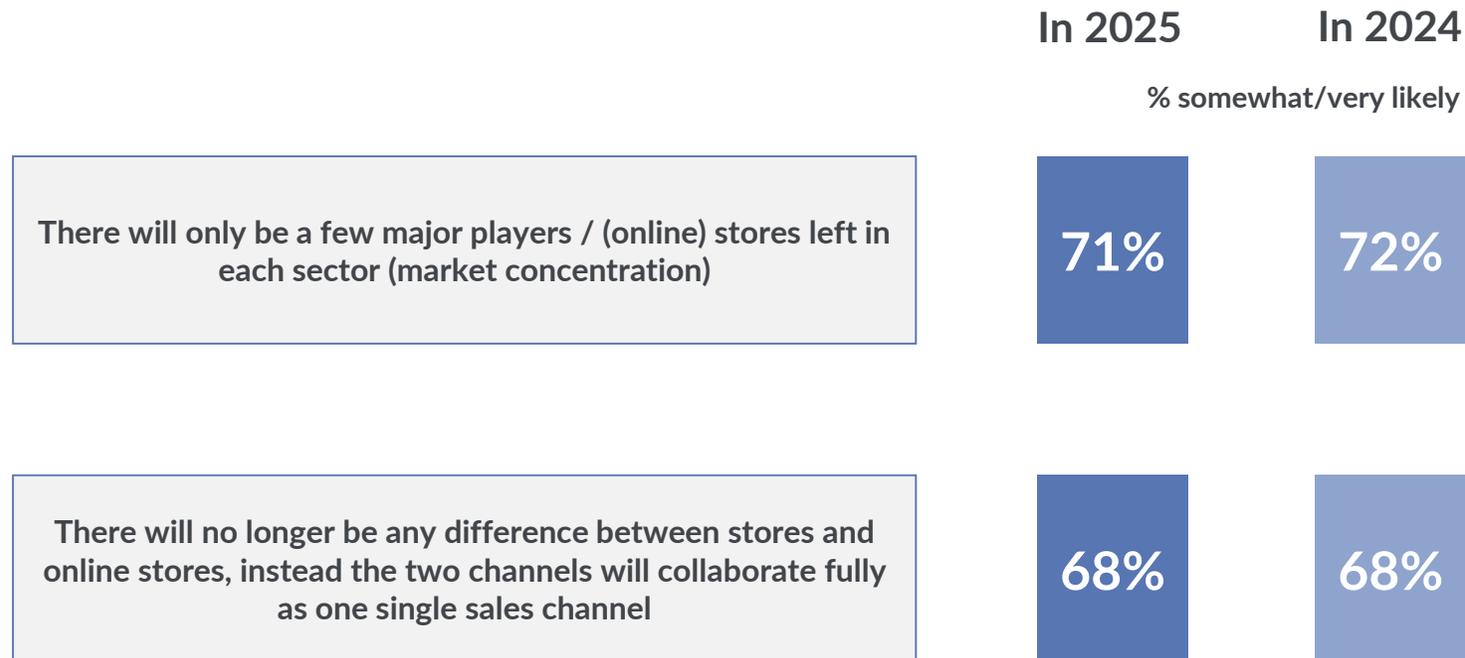
Base: all respondents
2020: n=1.026, 2019: n=1.003

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Majority of consumers think that there will be market concentration in 5 years and online and offline will act as one sales channel



Likelihood of the following scenarios



B01: To what extent do you consider each of the following scenarios (un)likely in 2025?

* Top 2 on a 4-point scale

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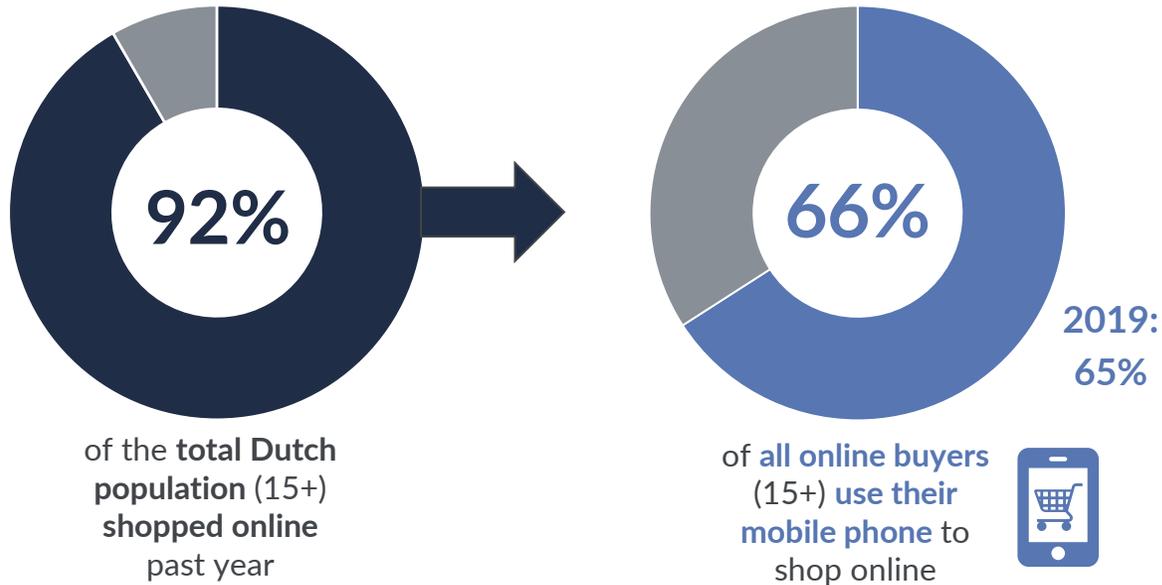
* new in 2020
Base: all respondents

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Almost half of all online buyers expect to make the majority of their online purchases by their smartphone in 2025



Online buyers smartphone



In five years, **46%** of all online buyers (15+) expect to make the majority of their online purchases using a smartphone (2019: 47%)



C01: In five years' time, I expect to make the majority of my online purchases using a smartphone (through an app or mobile website)

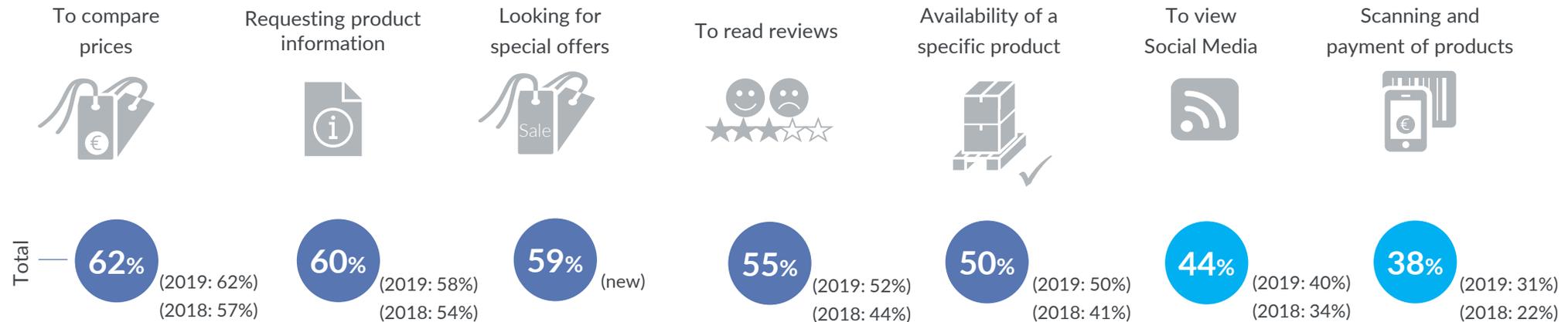
■ ShoppingTomorrow 2020

Base: all respondents purchasing online, n=922

Increasing frequency of the use of smartphones in stores: especially for viewing social media and scanning and payment of products



Use of smartphone in a (physical) store



C04: Do you use your smartphone in a (physical) store for the following purposes?

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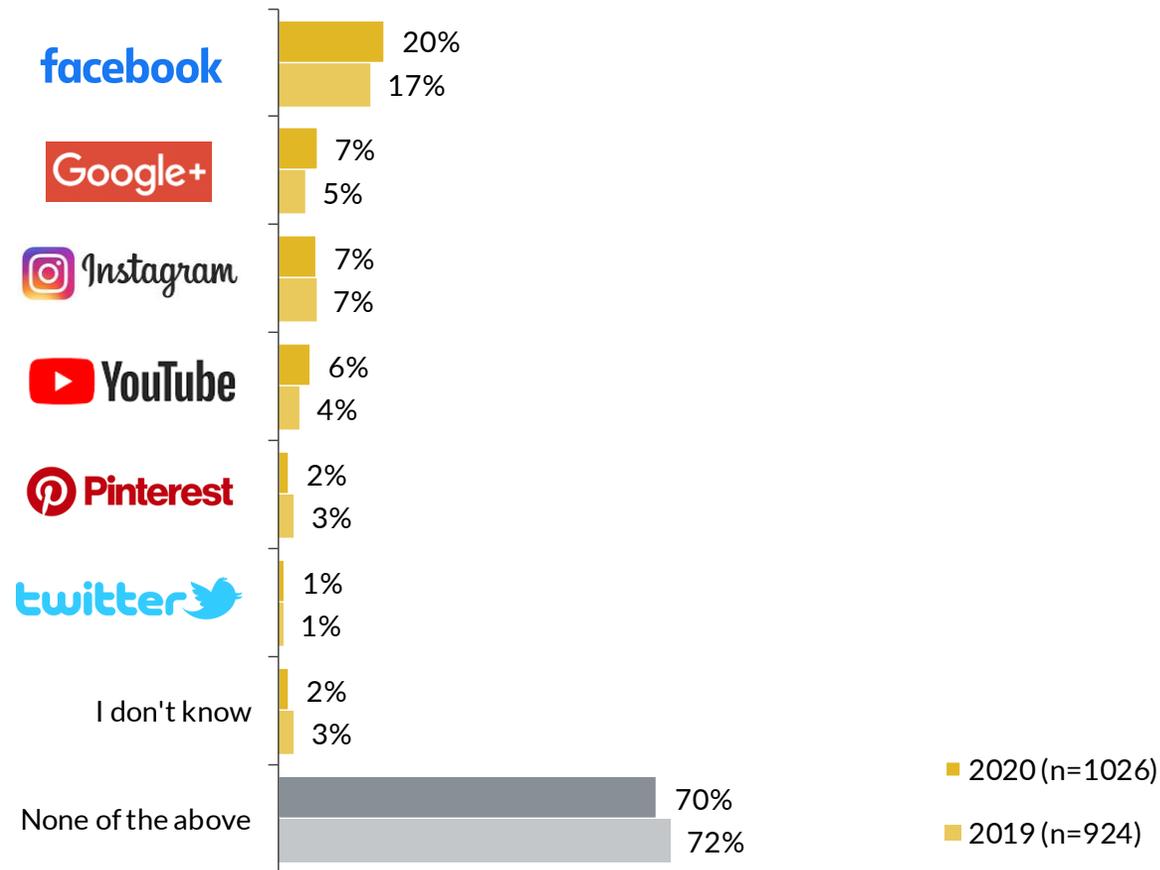
Base: all respondents

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Social commerce: slight increase in online purchases via Facebook, but most consumers haven't made a purchase via social media yet



Purchases through social media



E02: Through which social media have you made purchases in the past?

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Base: all respondents that purchased online

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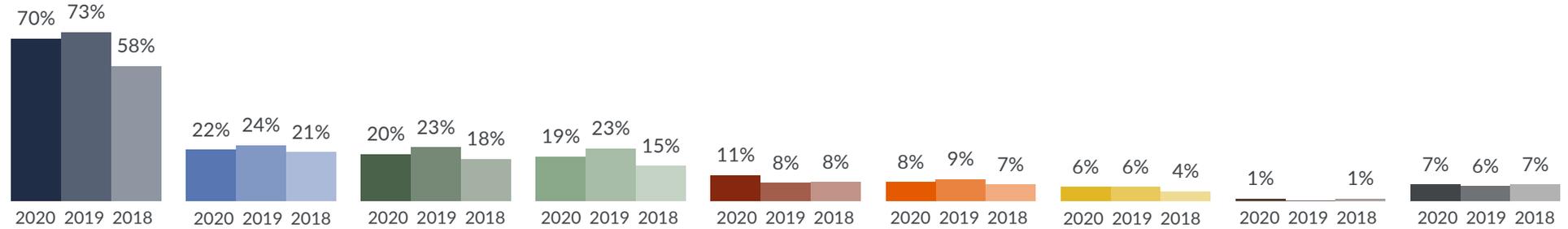
How do they want to interact with retailers?

Store visit is still the most preferred mode of contact with retailers when needing advice. Voice chat is winning in popularity especially under youngsters



Preferred mode of contact with retailers in case of need for information or advice

All



Store visit



Text chat



E-mail or retailer's Website



Telephone call



Voice chat



Retailer's mobile app



Social media

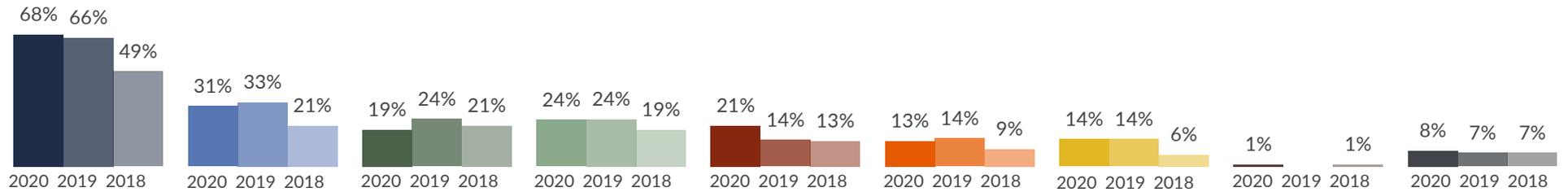


Another way



I don't need/want any type of communication

15-34



F01: Imagine you want to buy a product or service and you need advice. Think of clothing, a desk lamp, a sleeping bag or a camera. What type of communication would you prefer to have with the provider?

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Base: all respondents
2020: n=1.026, 2019: n=1.003, 2018: n=1.004

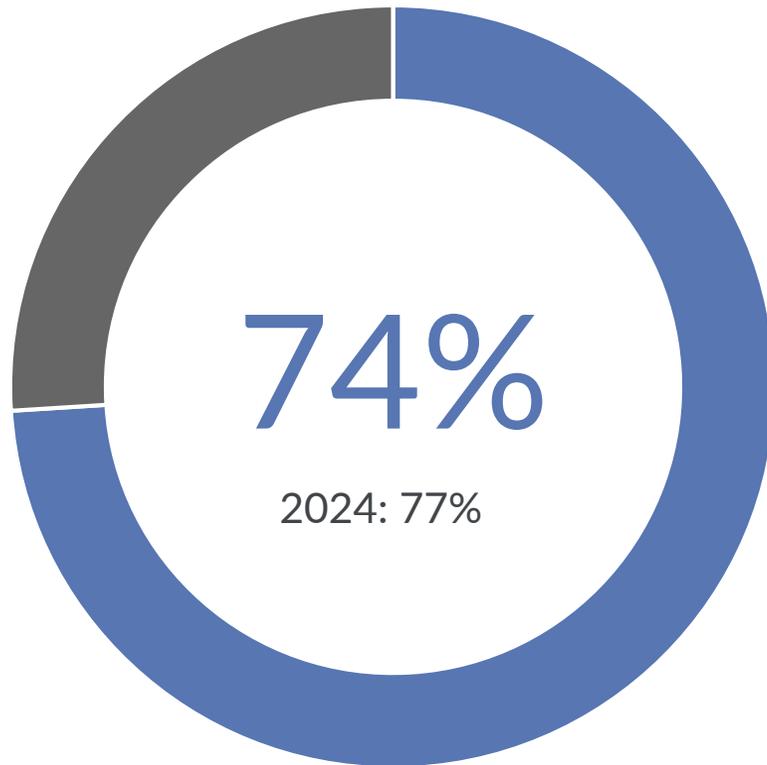


What's consumers' attitude toward new retail technologies?

Personalization is expected, but only half of consumers think that it is actually available in 2025



Likelihood of a personalized range of products and services when shopping online in 2025



Technologies available in the Dutch retail landscape in 2025
(% in many stores / almost all stores)



B01: To what extent do you consider each of the following scenarios (un)likely in 2025?

* Top 2 on a 4-point scale

B02: To what extent do you think that we will see each of the following technologies in the Dutch retail landscape in 2025?

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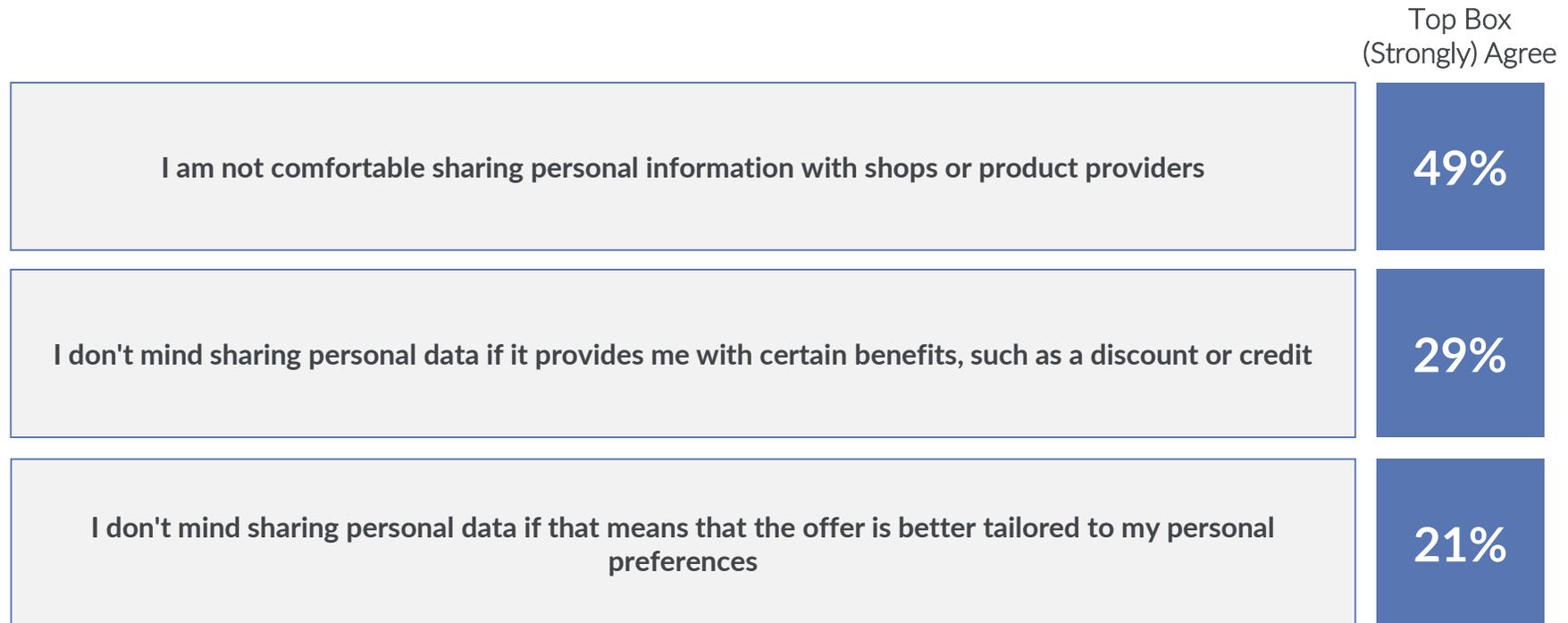
* new in 2020

Base: all respondents
2025: n=1.026, 2024: n=1.003

There is a hurdle: half of all consumers is not comfortable in sharing personal information with shops or product providers



Sharing personal information and data



S02: To what extent do you agree or disagree with the following statements?

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Base: splitrun 2, n=513

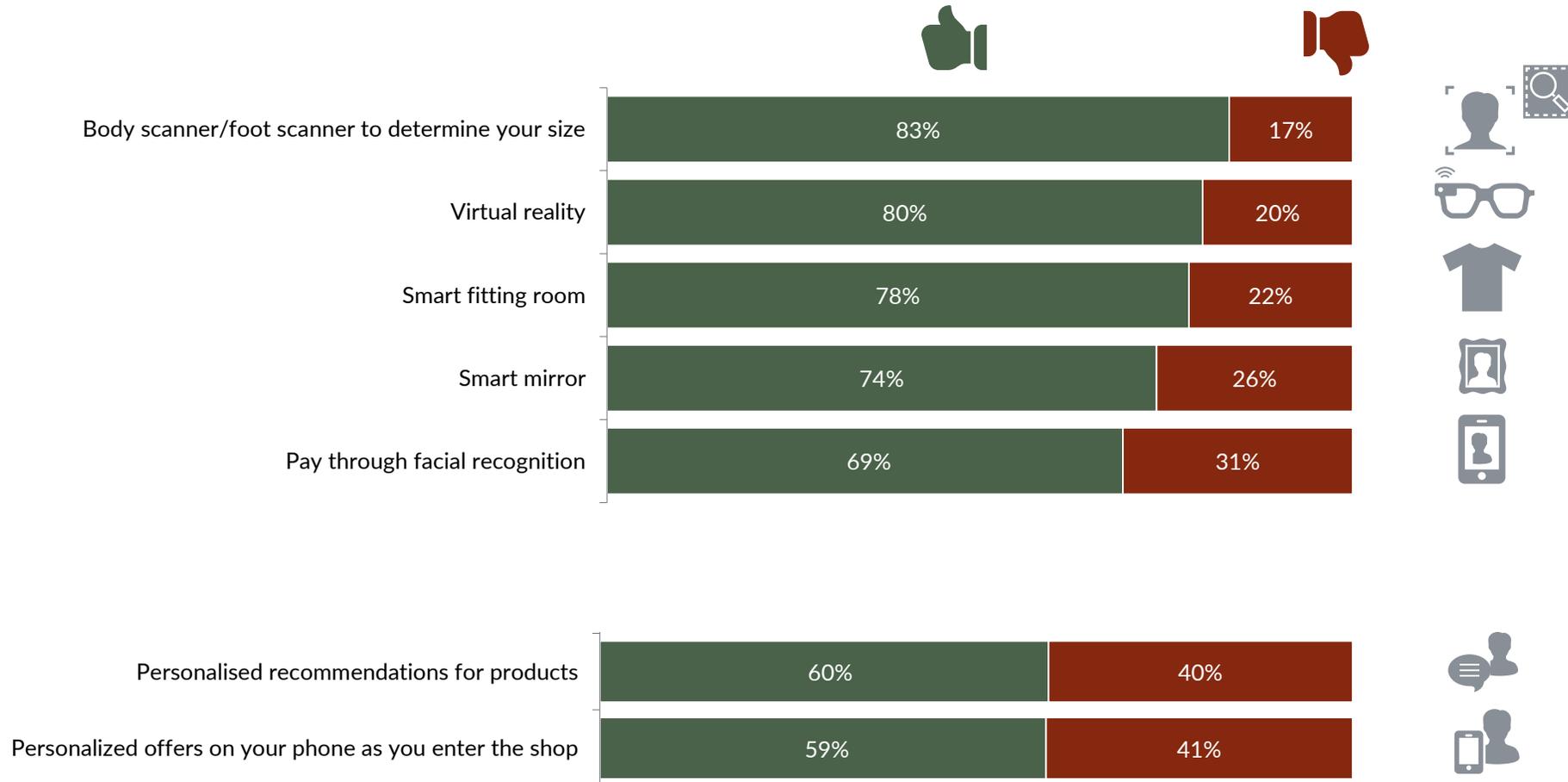
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16

Consumers' attitude toward the bodyscanner / footscanner and VR is most positive among all new technologies



Attitude toward the use of new technologies in stores



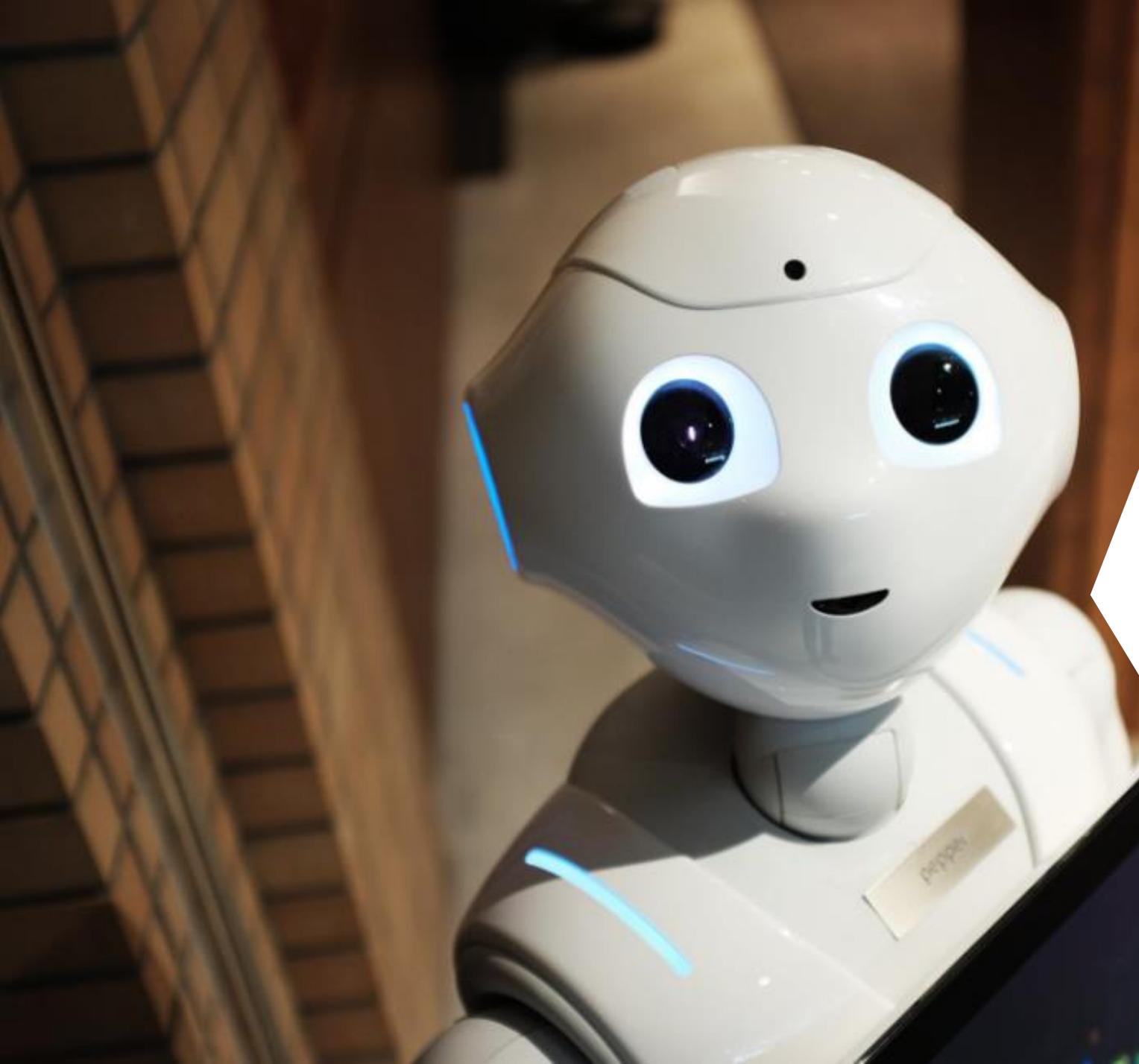
B03: To what extent would you have a positive or negative attitude toward the use of the following technologies in a physical store?

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Base: all respondents, n=1.026

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17



Do we see this in stores in 2025?

Majority of consumers are not open to being served by robots in physical stores

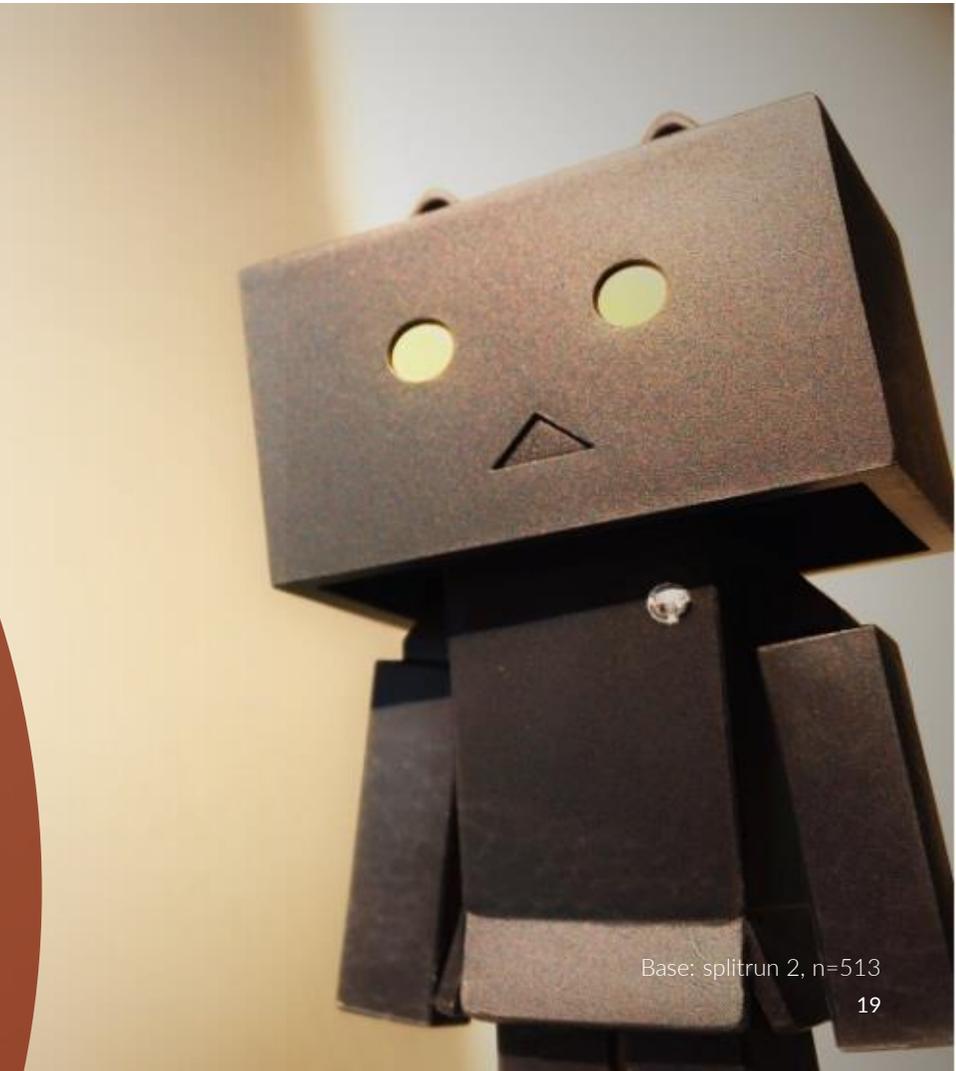


Experiences usage of robots in physical stores

62% I'm not open to being served by robots in physical stores

10% I've seen a robot in a physical store before

8% I've used a robot in a physical store before



Consumers find cleaning the store, restocking the shelves and providing product information the three best used applications for robots in physical stores



Applications for the use of robots in physical stores



Q01: In the coming years, more physical stores will use robots. For which three applications do you think robots can best be used by physical stores?

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Base: splitrun 2, n=513

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Thanks for your
attention!

Questions?